

Summit Overview

The Facilities Management Dashboard



Welcome to the Facilities Management Dashboard

As a Facilities Manager, you now have access to the Summit Facilities Management Dashboard. This dashboard provides data pertinent to your day-to-day processes.

When you access the Facilities Management Dashboard, your default view will be the **Summary** tab. This tab provides you with high-level activities related to key business drivers. You will also have access to the **Demographics** tab. This tab is a good reference point for your non-financial information for Fund Balance, Budget Balance, and Non-Sponsored Projects, including Speedtype.

How do I view Dashboard information?

You can refine the data displayed in the Summary tab widgets by entering values in the Prompt fields on the Summary tab. You should select the Project ID when filling out Prompts. For step by step instructions on the recommended prompt selections, please see the Understanding the Facilities Management Dashboard job aid.

The **Summary** tab provides high-level widgets for the following activity areas:

- Project Information
- Expenditure Summary
- Procurement Summary – Open PO Lines

These widgets are displayed in table format. If prompt information does not bring back results for a widget, a message will appear that states “No data found for the filter criteria” as shown in the below example.

The screenshot displays the Summit Facilities Management Dashboard. At the top, there are tabs for 'Summary' and 'Demographics', and a 'Page Options' dropdown. Below the tabs, a message states: 'The data is as of Tue, Oct 18, 2011' and 'You are using Summit PROD pointing at the OBPRD00 database.' A red arrow points to a section labeled 'Prompts' which contains several dropdown menus: 'Through Fiscal Period' (2012-04 (Oct, 2011)), 'DeptID' ((All Choices)), 'Fund' ((All Choices)), 'Assistant Director' ((All Choices)), 'Project PI' ((All Choices)), 'Co-PI' ((All Choices)), 'Project' ((All Choices)), 'Project ID' (M5010FEDSTIMU35), 'Status' ((All Choices)), and 'Class Code' ((All Choices)). A 'Go' button is located to the right of these prompts. Below the prompts, there is a 'Reports' sidebar on the left with links for 'Task Reports', 'All Projects Report', 'Project Expenditures by Month - Active', and 'Project Expenditures by Month - YTD not equal to Zero'. The main content area shows a 'Project Information' widget. A red arrow points to this widget, which displays the message 'No data found for the filter criteria' and a 'Refresh' link. The word 'Widget' is written in red below the widget.

How do I drill into an activity?

The widgets on the Facilities Management Dashboard provide high-level activities and key data associated with each activity. For example, the Expenditure Summary displays a table of summarized

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financial data for those Account Groups with expenditures. Each row displays the Fiscal Month to Date, Fiscal Year to Date, Budget, Project to Date, Encumbrance, Balance, and % Remaining.

Expenditure Summary							
Account Group	Fiscal Month to Date	Fiscal Year to Date	Budget	Project to Date	Encumbrance	Balance	% Remaining
All Expenses	0.00	0.00	700,000.00	0.00	0.00	700,000.00	100.00%
Other Costs	0.00	0.00	0.00	16,644.00	0.00	(16,644.00)	
Task 20_Design Consultants	0.00	9,525.00	0.00	292,398.50	6,085.75	(298,484.25)	
Task 30_Construction	0.00	4,570.00	0.00	256,367.57	37,647.34	(294,014.91)	
Task 31_Alterations Construct	0.00	0.00	0.00	38,912.62	1,875.00	(40,787.62)	
Task 40_FF&E & On Campus Exp	0.00	3,915.30	0.00	30,550.27	8,697.14	(39,247.41)	
Task 41_Hazmat Abatement	0.00	0.00	0.00	9,358.50	450.00	(9,808.50)	
All Expenses Total	0.00	18,010.30	700,000.00	644,231.46	54,755.23	1,013.31	0.14%
Total	0.00	18,010.30	700,000.00	644,231.46	54,755.23	1,013.31	0.14%

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[Expenditure Detail - All Accounts](#)

You'll notice in the example above that the values in several of the columns are displayed in a blue font (e.g., Account Group, Fiscal Month to Date). Whenever you see values displayed in blue, you can click on that field to drill down into more detailed data about that specific activity. Below is an example of a drill down. Here the user clicked on the Task 20_Design Consultants Account Group to view more detailed information about that Account Group.

Facilities Management - Revenue and Expenditure Detail - All Accounts

Through Fiscal Period	DeptID	Project	Fund					
2012-04 (Oct, 2011)	L300600000 - Facilities	M5010FEDSTIMU35 - FY10 Fed.Stim. Wann. FMP10-251	51425 - Internal UML Projects					

Account Group	Account ID - Desc	Fiscal Month to Date Expenditure	Fiscal Year to Date Expenditure	Budget	Project to Date Expenditure	Encumbrance	Balance	% Complete
Task 20_Design Consultants	757060 - Architcts/Space Plan/Ldscepe	0.00	0.00	0.00	116,673.15	6,085.75	(122,758.90)	
	757140 - Health/Safety Experts	0.00	0.00	0.00	2,454.70	0.00	(2,454.70)	
	757220 - Planners	0.00	9,525.00	0.00	173,270.65	0.00	(173,270.65)	
Task 20_Design Consultants Total		0.00	9,525.00	0.00	292,398.50	6,085.75	(298,484.25)	
All Expenses Total		0.00	9,525.00	0.00	292,398.50	6,085.75	(298,484.25)	
Total		0.00	9,525.00	0.00	292,398.50	6,085.75	(298,484.25)	

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Can I print and/or download widgets within the Facilities Management Dashboard?

Yes, each widget will include a **Print** or **Download** link at the bottom of the widget. Print options include HTML and PDF. Download options include Microsoft Excel, CSV, and PowerPoint.

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For More Information

A fundamentals tutorial and other online support is available at <http://empac.uml.edu> in the *Information for..* section. You can also contact [Maura Shield](#) or [David Mann](#) if you have questions.